

# Fee Agreement Template

Use this template to engagement terms for [service type].

## Template Metadata

Field	Details
Category	Legal
Owner	[Team or owner]
Version	[Version number]
Effective Date	[Date]
Review Cycle	[Monthly / Quarterly / Annual / Event-based]
Status	[Draft / In Review / Approved]

## Scope of Services

Define precisely what legal services the firm will provide. Be specific about what is included and what is explicitly excluded. Identify the attorneys assigned and their roles.

Item	Details	Owner	Status
[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]
[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]

## Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

## Fee Structure

Create a table showing the fee arrangement: hourly rates by attorney level, flat fees, contingency percentages, or hybrid arrangements as appropriate. Include rate escalation terms if applicable.

Item	Details	Owner	Status
[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]
[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]

### Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

## Billing Practices

Describe billing frequency, payment terms, minimum billing increments, trust/retainer deposit requirements, interest on overdue balances, and the client's right to question charges.

Item	Details	Owner	Status
[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]
[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]

### Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

## Expense Policy

List reimbursable expenses and the firm's policy on each: filing fees, expert witness costs, travel, copying, courier, electronic research, and court reporter fees. Distinguish between passed-through at cost vs..

Item	Details	Owner	Status
[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]
[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]

## Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

## Termination Provisions

Address both client-initiated and firm-initiated termination: notice requirements, grounds for withdrawal, handling of files upon termination, final billing, and return of unearned retainer. Use clear language. This is.

Item	Details	Owner	Status
[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]
[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]

## Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

## Review and Signoff

Document review conclusions, approvals, unresolved items, and next review date.

Role	Name	Date	Notes
Preparer	[Name]	[Date]	[Notes]
Reviewer	[Name]	[Date]	[Notes]

<b>Role</b>	<b>Name</b>	<b>Date</b>	<b>Notes</b>
Approver	[Name]	[Date]	[Notes]